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AUTHOR Sanders, Wendy Hinrichs
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ABSTRACT

This consultant's manual aims to assist those who conduct training and technical assistance sessions for early childhood programs and staff. Section 1 offers background theory about effective ways to teach or to guide adults through a learning experience. Section 2 introduces the assistance process as a cycle progressing from assessment through design, conduct of the session, evaluation, and, for supervisors and trainers, observation and follow-through. Elements of planning and conducting workshops or group training sessions are explored in Section 3. Section 4 describes the steps in facilitating a problem-solving session in an early childhood program. Section 5 offers tips on marketing one's skills. Appended materials include information on the WCCIP consultation process, outlines of learning activities for use in adult education, and a brief resource bibliography. (RH)

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Wisconsin Child Care Improvement Project

TRAINING AND TECHNICAL ASSISTANCE

A CONSULTANT MANUAL

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Written by:

Wendy Hinrichs Sanders,
Project Director
June, 1987

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A CONSULTANT MANUAL

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TRAINING AND TECHNICAL ASSISTANCE:

A CONSULTANT MANUAL

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EARLY CHILDHOOD TRAINING AND TECHNICAL ASSISTANCE:

A CONSULTANT'S MANUAL

Introduction

This manual has been prepared by the staff of the Wisconsin Child Care Improvement Project to assist persons who volunteer or contract to conduct training and technical assistance sessions for early childhood programs and staff. Definitions are the first order. **Training** refers to a workshop, a small or large group session in which the workshop leader is responsible to guide adults through a group learning experience on a set topic, such as "Guidance and Discipline with Preschool Children." **Technical assistance** refers to a situation in which a consultant meets with one or two staff, usually at their early childhood program to guide them in solving unique problems for their program, such as: How to develop a start-up budget for school age child care.

This manual is presented in five sections: **Meeting the Needs of Adult Learners** gives a workshop leader or technical assistance consultant background theory about effective ways to teach or guide adults through a learning experience. The next section, **The Training and Technical Assistance Cycle** introduces the process as a cycle from assessment to design, conduct of the session to evaluation and back to assessment. Section three, **Training Early Childhood Program Staff**, explores the elements of planning and conducting workshops or group training sessions; and **Serving as a Technical Assistance Consultant** describes the steps in facilitating a problem solving session at an early childhood program. The final section, **Selling Your Skills as a Consultant**, gives some tips on marketing your skills as a consultant. An **Appendix** includes: the Wisconsin Child Care Improvement Project consultation process; a variety of learning activities for use in adult education experiences; an agenda for training early childhood consultants; and a resource bibliography.

SECTION ONE: MEETING THE NEEDS OF ADULT LEARNERS

A Theoretical Framework

In looking at education from an historical perspective, one can find a common thread that runs throughout major theories: learning occurs through a variety of experiences in which the learner interacts with the environment. Learning is epigenetic, or each learning experience builds upon the previous ones and occurs in a progression from basic to advanced skills. A simple example of this is that a child first learns to crawl, then to walk and finally to run from many opportunities to practice each of these skills on the floor, in the yard, on a sidewalk or rural pathway. Hence, learning experiences must be consistent with the developmental level and appropriate to the individual needs of the child.*

There seems little reason to doubt that learning sessions for adults should focus on a similar design of experience, developmental appropriateness and individual needs. Let's look briefly at these concepts through several theories that guide adult education.

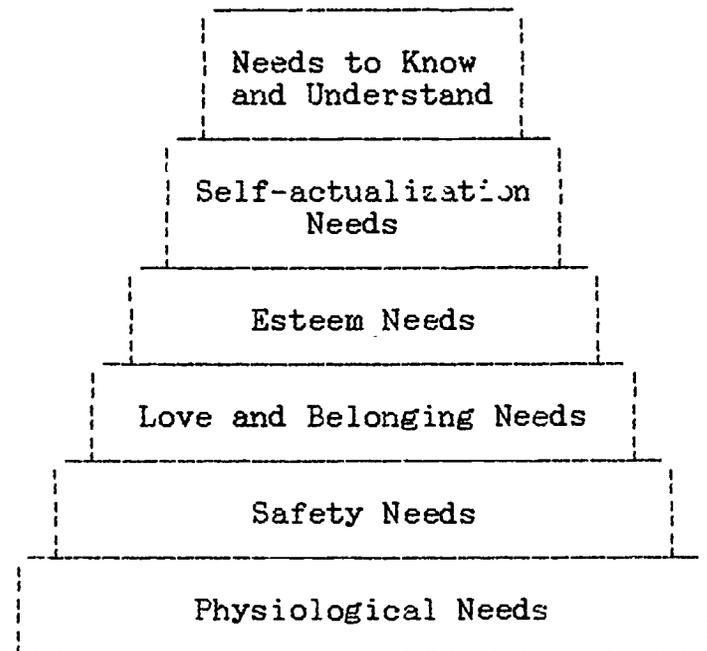
Maslow's Hierarchy (Exhibit I-A) presents a concept that is essential in understanding learner needs. He developed the framework from looking at the lives of successful people and analyzing the needs they met. Maslow states that each need must be gratified before the person is free to aspire to the next higher need. A healthy person is one who has had basic needs satisfied and is motivated to reach her highest potential (Maslow, 1943).

In focusing on the developmental stages of adult life, two theorists shed some light. In defining his Seven Ages of Man, Erikson (1963) discusses the seventh age, that of mature adulthood as a crisis of generativity versus stagnation. He sees the adult as striving to reach a high level of creativity and productivity that includes assisting in the development of young children. This is the period of work activity and if the adult feels satisfaction from these tasks, the result will be a feeling of accomplishment and success in the adult's life.

Havighurst (1954) outlines Developmental Tasks for life. He notes that these tasks are a result of the social process based upon the concepts of cultural background and acceptance. There are two phases of adult life which are of interest to adult educators. The first is that of early

* For further exploration about learning theory, see works by or about: Comenius; Pestalozzi; Froebel; Dewey; Bruner; and Piaget.

MASLOW'S HIERARCHY OF NEEDS



adult (ages 18 - 30 years) in which the person is involved in tasks of beginning a family living plan, choosing a spouse, having children, getting started in career and community roles. The second is defined as middle ages (30 - 55 years) which are devoted to achieving social, civic, and occupational success, participating in an evolving family life and establishing a secure self-identity.

Looking at stages of preschool teachers, Lillian Katz (1977) suggests four stages and appropriate training needs for each level. The first stage is survival and encompasses the first months of teaching: The need is for encouragement, support and on site advice to help make it through the day. The second stage, consolidation, begins somewhere near the end of the first year: The teacher feels some self-assurance from having survived the first year and is ready to consolidate her teaching efforts to focus on planning and curriculum design. Inservice training and on site consultation with practical application ideas will be most effective; sharing experiences and resources with other teachers will also be helpful at this time.

The third stage, renewal, occurs after several years of teaching experience. New ideas and rejuvenation is sought. Teachers will look to memberships in professional organizations and to attend workshops at a local or regional level. Specialized course work and curriculum planning will be of interest. The final stage, maturity, is reached when the teacher recognizes herself as an early childhood professional. A theory of education and child development has evolved within the teacher and she can transcend to a level of mentor for other caregivers. This is the time when advanced degrees are sought and the teacher may look to leading workshops herself. Professional growth has become a solid and comfortable part of the teacher.

Towards a Construct for Adult Education

Malcolm Knowles (1970) perceives the adult learner having three basic needs: to prevent obsolescence; to adopt self-identity; and to mature along an epigenetic, inter-related set of growth dimensions. Knowles outlines "andragogy" (from the Greek words for man-learning) as the method for reaching adult learners by recognizing that they are voluntary, self-directed learners. He presents four major concepts of andragogy. (See Exhibit I-B for an overview to these concepts.)

The self-concept of an adult is based upon emerging self-directedness. As a result, the learning climate must be adult-like, in environment, format, style and behavior of the leader. In other words, it should not be conducted in preschool chairs with child-like activities.

The adult's readiness to learn is based upon a need to fulfill the tasks required to perform social and career goals. Adults know what they need to learn and what they want to learn; their input should be sought when planning any training or technical assistance session for them. A trainer becomes a catalyst, not a transmitter of knowledge.

The adult learner has had a rich resource of experiences. Those experiences should be drawn out and built upon to guide the learner to higher skills. Previous individual experiences also enable adults to become a combination of teacher and learner; sharing of ideas and experiences should be a part of all training.

Finally, Knowles observes that the focus of adult learning is problem centered rather than subject centered. Therefore, the orientation of training and technical assistance should be to focus upon existing problems and alternative solutions.

He summarizes the andragogy process: the learning climate must be conducive to adult needs; the structure must include adult participation in planning, determining needs, formulating objectives, designing learning experiences, presenting those activities and evaluating the learning outcomes.

See Exhibit I-B, Adult Learning, for a summary of key points about adult education.

SECTION TWO: THE TRAINING AND TECHNICAL ASSISTANCE CYCLE

Training and technical assistance can be described as a cyclical process. (Exhibit II-A.) The stages include: assessment, design, conducting the session, and evaluation. For those persons who train the staff they supervise, a fifth stage, observation/follow through is essential.

Assess

In order to effectively address the training or technical assistance needs of participants, the consultant needs to know their needs! There are a variety of needs assessment formats that may be utilized to ascertain learner needs in advance of the training session. In Exhibit II-B, **Types of Needs Assessments**, needs survey formats are listed with advantages and disadvantages of each. Every early childhood program should conduct a program-wide training needs assessment each year to prioritize group needs that could be addressed at workshops or inservice training sessions. A **Sample Training Needs Assessment** for an early childhood program is presented in Exhibit II-C. The results of the needs assessment should be presented to a workshop consultant as they relate to her topic. You may feel comfortable asking the program director some questions, such as these, before you design your workshop.

- * What is the range of ages of the participants? What is the range of years of experience in working with young children? What is the range of ages of children in your program? How many staff work with each age group? What are the position titles of your staff? How well do they know each other--do they meet often for training, for meetings, etc?
- * What is the range of their experiences with this topic? Do some staff have expertise in this topic? Is this a new topic to some staff? Have you had other similar workshops for your staff?
- * What types of workshops have you had for your staff that have been highly rated by them?
- * Is this topic a need that a supervisor identified or a need that was identified by the staff of your program?
- * What is your philosophy about education for young children? What different teaching styles do your staff exhibit?

For workshop presenters it will be necessary to check participant needs in a quick process before or at the

ADULT LEARNING

<u>Adults Learn When They . . .</u>	<u>And their Rate of Retention is . . .</u>
Actively teach or present to others	95%
Practice doing	75%
Simulate doing	65%
Discuss	50%
See a demonstration	30%
Have an audio visual	20%
Read	10%
Hear a lecture	5%

(Source unidentified--anonymous)

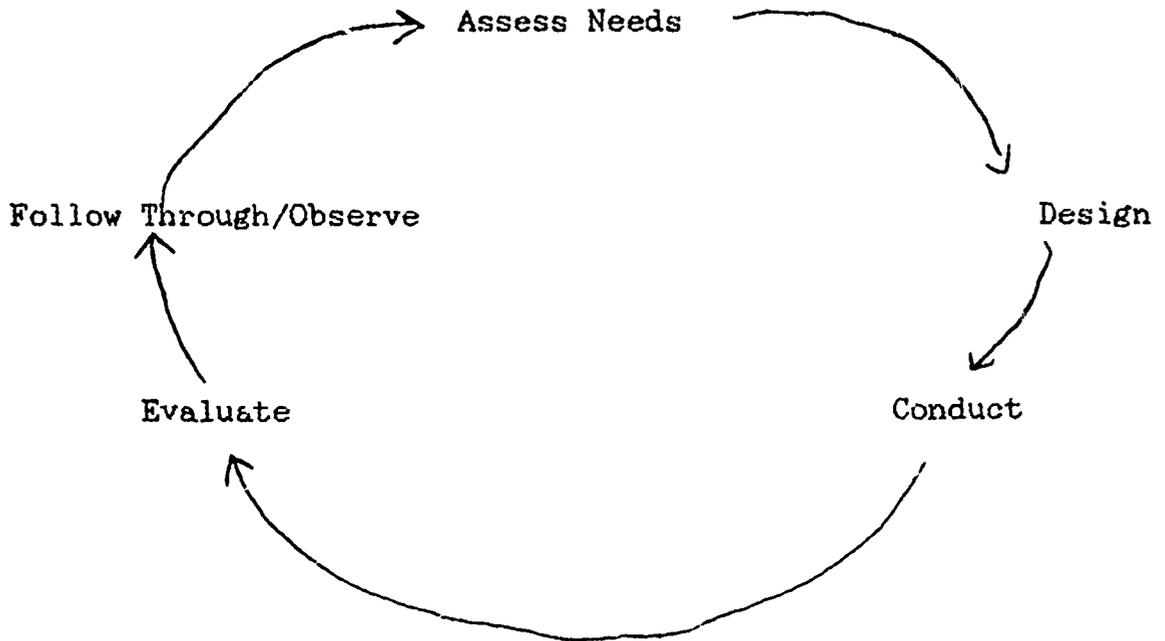
How Adults Learn--Assumptions of Knowles' Andragogy

1. Adults have a good deal of first-hand experience which should be respected and built upon in learning environments.
2. Adults have a great many preoccupations outside of a particular learning situation. Learning must be directed towards solving real problems that adults face in their work situation.
3. Adults have a preference to be self-directed whenever possible.

The Effective Adult Educator

- * The learning environment must be conducive to adult learners.
- * Learning is an internal process.
- * Some teaching methods are more effective with adult learners than others.
- * The structure must include learner participation in:
 - planning,
 - determining needs,
 - formulating objectives,
 - designing learning experiences,
 - presenting those activities and
 - evaluating the learning outcomes.

TRAINING AND TECHNICAL ASSISTANCE



TYPES OF

Types of Appraisal Tool	Time Commitment	Structure
1. Essay	major	free flow narrative
2. Critical Incident Technique	major, on-going	dated daily records
3. Forced Distribution Ranking	medium	percentages: 5% = excellent 15% = good 60% = average 15% = below ave 5% = unsatisfac
4. Trait/Behavior Checklist	minimal	10-20 times tailored to specific work job; numerical value or judgmental statement
5. Linear Scales	minimal	10 - 20 times tailored to specific work job; rated on continuum 0-25-50-75-100 unsat/accept/excell
6. Management by Objectives (MBO)	extremely time consuming	employees set own goals which complement agency goal

NEEDS ASSESSMENTS

Major Disadvantage	Major Advantage
biased	comprehensiveness for people
bias of appraiser on specific incidents	specific longitudinal
difficult to justify or verify	good for determining compensation/merit pay
may have the effect of "grading" on employees	minimizes biases; can be used to form Forced Distribution Ranking (#3)
appraisers tend to group scores around the middle	lends itself to form justification for Forced Distribution Ranking (#3)
difficult for people without excellent communication skills	team building concept for competent professionals



SAMPLE TRAINING NEEDS ASSESSMENT

In order to plan the monthly staff inservice topics and individual consultation topics, I would like your assistance. Please review the following list of topics for staff inservice. Consider your own skills, abilities, and needs as well as those of your children. Rate the topics 1-5 according to priority in meeting your individual needs. Five is a topic of highest priority and one is a topic of little or no priority. Please circle a topic on which you would prefer individual consultation.

SAFETY:

- | | <u>PRIORITY</u> |
|--|------------------------|
| 1. Learning about the WI State Day Care Rules. | 1. _____ |
| 2. Hints for maintaining a safe classroom at all times of the day. | 2. _____ |
| 3. Ideas for safety education. | 3. _____ |

HEALTH:

- | | |
|--|----------|
| 4. Ideas for health and mental health education. | 4. _____ |
| 5. Ideas for nutrition education. | 5. _____ |
| 6. First aid training. | 6. _____ |

ENVIRONMENT:

- | | |
|---|-----------|
| 7. Arranging the classroom for low tension levels. | 7. _____ |
| 8. Labelling classroom equipment for easy child access. | 8. _____ |
| 9. Ideas for classroom dividers. | 9. _____ |
| 10. How to arrange a block area for maximum learning experiences. | 10. _____ |
| 11. How to stimulate creativity in an art area. | 11. _____ |
| 12. How to choose appropriate materials for the classroom. | 12. _____ |
| 13. Tips for multi-cultural education. | 13. _____ |

PHYSICAL DEVELOPMENT:

- | | |
|--|-----------|
| 14. Gross motor development and activities. | 14. _____ |
| 15. Fine motor development and structured and non-structured materials and activities. | 15. _____ |
| 16. Ideas for exploring the senses. | 16. _____ |

COGNITIVE DEVELOPMENT:

- | | |
|--|-----------|
| 17. Preparing, using, and measuring with instructional objectives. | 17. _____ |
| 18. Developing problem solving skills. | 18. _____ |
| 19. Teaching time and space relations for preschoolers. | 19. _____ |
| 20. Ideas for math concepts with preschoolers. | 20. _____ |

LANGUAGE DEVELOPMENT:

- | | |
|--|-----------|
| 21. Language development and problems in young children. | 21. _____ |
| 22. Questions and questioning with young children. | 22. _____ |

23. How to plan activities for children to talk in preschool. 23. _____
24. Some ideas about reading readiness in preschool. 24. _____

CREATIVE DEVELOPMENT:

25. How to plan for development of creativity in young children. 25. _____

SELF CONCEPT DEVELOPMENT:

26. How to plan and ideas for activities for self concept development. 26. _____
27. Self-help skills 27. _____
28. Emotional development in young children. 28. _____

SOCIAL DEVELOPMENT:

29. Planning activities for socialization skills in preschoolers. 29. _____
30. Social development in young children. 30. _____

GUIDANCE/DISCIPLINE:

31. Developing a Discipline Policy. 31. _____
32. Developing a consistency among staff in a child management system. 32. _____
33. When to refer behavior problems for special help. 33. _____

FAMILIES:

34. Developing a rapport with families. 34. _____
35. What to do on a first home visit. 35. _____
36. Parent/staff communication: How to use it. 36. _____
37. Developing a parent corner. 37. _____
38. Stress in the family. 38. _____

PROGRAM MANAGEMENT:

39. Time management and record keeping as a preschool teacher. 39. _____
40. Managing personnel in a preschool center. 40. _____
41. Effective communication with staff in a preschool center. 41. _____
42. Sharing responsibilities and leadership on a preschool teaching team. 42. _____
43. Fundraising ideas. 43. _____
44. Developing a budget for your center. 44. _____
45. Personnel management. 45. _____
46. Developing policies for your center. 46. _____
47. Child abuse recognition and reporting. 47. _____

PROFESSIONALISM:

48. Resources for Early Childhood Educators. 48. _____
49. Creating a professional image in your community. 49. _____
50. Advocacy for children, for parents, for the field of early childhood education. 50. _____

beginning of the workshop. Technical assistance sessions generally occur after an early childhood program has identified a problem and determined that it needs outside assistance to deal with the problem. The program then solicits help to meet a specified need. However, the need identified is often not the root of the problem being tackled by the agency. It is the consultant's role to help the program staff determine the true needs. For example, a program may request help with developing a budget to meet their costs but in fact, a marketing plan is needed to help fill the child care center.

Design

Preparation time is needed to plan a training or technical assistance session. Generally, this is time-consuming and often is not paid for by a consultant subcontract. The essential ingredients to the design of training and technical assistance sessions include: logistics (date, time, location, environment); agenda; and resources. A technical assistance consultant should consider other topics that might be a part of the program's request and be prepared with resources and with information on those topics as well. Be sure to keep in mind the theories of adult education that will help you design a program that effectively meets participant needs. If working on a contract basis, the early childhood program is paying for your expertise in designing a productive session.

Conduct

Be it workshop or technical assistance session, the effectiveness of your design will prove itself when you conduct the session. While the role of the adult educator is that of catalyst or facilitator, all participants look to you to "lead" the sessions. You must think on your feet, make adjustments if different people show up than registered or different needs are raised than were originally requested. If the session works, it is because you were well prepared and versatile. Poise is the name of the game!

In either setting, it is essential that you arrive before the training or technical assistance session begins and that the session ends on time. People who have arrived on time do not want to be asked to wait for those who are late and they do not want to end after the scheduled time.

At a workshop, it is claimed that people form an impression within fifteen minutes of arrival. Greet each person; snacks and beverages will relax people and make them feel at ease.

Evaluate

In order for the consultant and for the participants themselves to determine if the session appropriately met their needs, an evaluation of the session must be conducted. You may do this simply by reviewing the topics covered and tasks assigned in a technical assistance session or by asking workshop participants to share one thing they learned from your session. Pencil and paper, anonymous evaluations are usually most effective to give you feedback on your skill in presenting the topic and your style in working with adults.

Evaluation should cover the following areas: knowledge and style of the consultant; format; content; logistics and; resources.

Observe/Follow Through

If you supervise the participants in a workshop session, you have the best opportunity to evaluate the effectiveness of the workshop by observation of and a follow up conference. You may offer a follow up assignment from staff at the workshop, such as to develop a Discipline Policy for the classroom. At your next visit to the center, you review the policy with the staff and provide on site, individualized feedback. Success of follow through may be recorded by completion of: checklists on the topic; lesson plan review; critical incident notes; anecdotal records; pre- and post-test ratings; time studies; or running narrative observation notes.

Suggest resources for more extensive information or information at a more basic level to the full group. Individuals can then seek the help appropriate to them. Don't hesitate to suggest that participants seek further assistance from professionals in the early childhood field or other business fields to meet their needs on a consultation basis.

Your evaluation or observation steps will lead you to assess continuing, additional or unmet needs. Before a consultant leaves a technical assistance session, it is critical that she clarify any unmet needs. This will bring you full circle to the beginning of the training and technical assistance cycle.

SECTION THREE: TRAINING EARLY CHILDHOOD PROGRAM STAFF

An effective workshop leader makes an effective workshop session. In Exhibit III-A, a list of **Workshop Presenter Qualities** is presented. Look through the list and prioritize those traits that are the ten most important in your mind for a workshop leader. Compare your choices with some colleagues and discuss your results. You might use the rating column then to assess your existing skill level as a trainer. Which traits do you need to improve upon; which traits are your strong points? Which skills are a priority for you to develop? Exhibit III-B, **Ten Tips for Presenters** suggests an overview to considerations for quality workshop sessions.

In this section information is presented to help you design and conduct training sessions that meet the needs of adult early childhood program staff.

Prior to designing a workshop for early childhood staff, you need to know their needs. The previous piece, **Section II: Assess**, described how you can obtain needs assessment information from an early childhood program. However, if your workshop occurs for participants from a variety of early childhood programs, such as at a state association conference, you will need to do a brief needs assessment before or at the beginning of your workshop. If you will be working with a group of participants over an extended period of time, such as a six week set of sessions, you may wish to individualize your approach with the learners. A sample **Individual Learning Styles Checklist**, Exhibit III-C, may help you work most effectively with each learner while helping each learner better understand their own learning style as well.

Once you understand the needs of the learners, you can then design the workshop targeted to meet their needs. There are a variety of workshop formats that you may choose to follow. Some are more appropriate to short workshop sessions, some more appropriate to a full day of training session. The most time consuming part of a training session is the planning and designing phase. Plan to spend enough time on this stage whenever you prepare a new workshop topic. Time spent appropriately on this step will make for a valuable and less stressful training session. An overview to the formats are presented in Exhibit III-D.

Agenda Sample I

This workshop format may be geared to a two-hour workshop, but is geared best to a half- or full-day session on one topic. It focuses on presenting useful information to adults with an emphasis on insuring that the learners can transfer the knowledge to their own early childhood setting.

WORKSHOP PRESENTER QUALITIES

SELF ASSESSMENT

	usually	sometimes	seldom	PRIORITY
acceptance				
commitment				
competence				
creativity				
enthusiasm				
flexibility				
fun				
knowledgeable				
leadership				
openness				
organized				
poised				
preparedness				
promotes group discussion				
respectful				
self-confident				
sensitivity				
thorough				
trustworthy				

TEN TIPS FOR PRESENTERS

1. Maintain your Self: your self image and your professional stature.
2. Know your participants: read your participants by performing an on-going check of their response/reaction and make changes if necessary/feasible.
3. Come well organized and well prepared...and be prepared to change to meet participant needs.
4. Challenge! Stimulate! Provoke thinking!...but tell them only as much as they ask for..not always as much as you think they need!
5. If you're bored, they're bored! Variation: substitute cold, hungry, tired, angry, excited...
6. Respond to your participants as colleagues. Treat them with as much respect, acceptance, warmth, commitment, enthusiasm, trust, and interest as you wish to receive from them.
7. Model everything positive about yourself...and look for everything that's positive in your participants.
8. Keep your values in check: they are only yours and they are only as good for you as a participant's values are good for them.
9. Aspire to be a teacher...not a preacher. You can and should aim for participant growth in knowledge and in skill...but don't demand changes in attitude.
10. Remember: Speak with them..not at them!

Individual Learning Styles Checklist

Please put an "X" next to the statement(s) listed below that apply to you.

- I like to be told or shown exactly how to do something.
- I like to be given two or three different ways to do something, then choose one for myself.
- I like to figure out for myself how to do something.
- I prefer to work through a task or problem on my own.
- I enjoy reading and can usually "translate" what I read into real life situations that are meaningful to me.
- It's difficult for me to put things down in writing.
- It's difficult for me to express myself verbally.
- I frequently observe other teachers/adults to find out what they do with children, how they do something.
- I frequently talk with other staff . . .
 - to get new ideas/suggestions for activities from them.
 - to "bounce" an idea I have off them.
 - to get feedback on what I'm doing, how I'm doing it.
 - to obtain advice on a problem I may be confronting.
- I feel uncomfortable asking questions . . .
 - in a group setting.
 - of my supervisor.
- I enjoy trying new things.
- I prefer to work on one thing at a time.
- I prefer to work on several different things at once, moving back and forth.
- My experiences with colleges/educational institutions have been very positive.

WORKSHOP AGENDA FORMATS

Sample I

needs assessment
opening activity/trust building
agreement on objectives
mini-presentation
discussion
practical application
follow through
evaluation
resources

Sample II

situational activity
derive principles
practical application
follow through/workshop evaluation/resources

Sample III

inquiry approach questions
objectives
didactic information
transition
hands on experiences
follow through/workshop evaluation/resources

Sample IV

objectives
didactic information
group discussion
follow through/workshop evaluation/resources

It will be comfortable to new as well as to experienced staff.

Needs assessment. You will want to check the needs of the persons who actually attend your session. Here are several quick techniques you may try.

- * **List:** At the beginning of your session, ask participants to share what they hope to learn from your session.
- * **Expertise, Please:** As people introduce themselves, ask them to share their experience with your workshop topic. For example, if your session is on school age child care equipment, you may ask each person to share the piece of equipment they have found to be most valuable in their center. You listen to their responses and analyze which missing links you then need to cover.
- * **Tell Us What You Know:** As participants enter your workshop, give them a slip of paper on which to write one fact about the workshop topic. Collect one piece of paper at the beginning of the session and use them as a brainstorming list of possible ideas. An example: For a child development workshop, ask participants to: "Write down one thing that a child learns to do by age two."
- * **Questions, Please:** As participants enter your session, give them a slip of paper and ask them to write down a question they have about your topic. Read the slips to yourself prior to the beginning of the session and you can adjust your agenda or objectives slightly to meet their needs. Example: For a workshop on staff communication, ask people to jot down one communication barrier they have faced.
- * **Situational Activity:** At the beginning of the session, give participants a situational activity related to your topic; break them into groups of five or six persons and have them jot down responses to the situation and then share them as a group. For example: For a guidance and discipline workshop, give a behavior problem to each group, such as a one year old biter--a three year old whiner--a four year old about to hit another child with a block. Ask participants to list and then share the various methods they have used to stop the misbehavior.

By listening carefully to the requests or responses of participants to any of these activities, you can obtain a clearer picture of their abilities and their needs. A skillful workshop facilitator can modify, not totally re-do

any workshop agenda.

Trust building activity. Participants can join in activities that will help them become familiar with each other and feel more at ease sharing their thoughts with the group. If you have a large group of 30 - 50 participants, you will want to break them into groups of 8 - 12 persons. Here are a few examples:

- * **Share...** Ask each person to share with the group their favorite song, movie, color; a child incident at their home or center that relates to the topic; the best compliment they received from a parent; their favorite finger play; or the game they most enjoy playing with children.
- * **I Can:** Ask participants to introduce themselves and share one thing they can do and one thing they would like to learn to do.
- * **Funny Bone:** Break into groups of 3 - 5 persons and invite them to tell a favorite joke OR the funniest incident with children that they remember.
- * **I Believe:** Give participants a slip of paper and ask them to finish the sentence you begin. Here are some starters: I believe that children learn by...; I believe that competent teachers are...; I believe that young children should...; I believe parents today...
- * **Wish List:** Ask adult learners to share one "wish" they have for the profession of early childhood educators.

Agreement on objectives. Develop a list of 3 - 5 workshop objectives. The objectives may be stated simply and directly, such as:

- * Describe a process for hiring early childhood staff;
- * Provide sample tools for teacher interviews;
- * Adapt the steps to meet each participant's agency.

At the workshop session, share the objectives with the group and check with them to be sure those objectives will meet their needs. Ask for additional requests and discuss how you might satisfy them. For example, if a participant asks if you can give samples of job vacancy notices, you might be able to meet with the person after the workshop or send some samples you have or refer them to another participant who has samples available.

Mini-Presentation. Remembering that adults learn by adapting your information to their individual early childhood

work setting will require you to share your information in a brief, but action-packed message!

- * Collect a research or theoretical base for the points you make
- * Complement the research with tips from practical experience with children or parents or preschool teachers
- * Organize your information by steps, a cycle or key principles
- * Complement your oral presentation with large charts or overhead transparencies that present the information visually
- * Keep your presentation to 20 - 30 minutes; even adults have short attention spans with lecture
- * Prepare a solid resource list to verify your sources and to give people books or journal articles to search for further information on the topic.

Discussion. Allow adequate time for participants to ask questions and to discuss your information. You may assign small groups to discuss specific points from your Mini-Presentation. For example: ask people to respond to the questions, "How do children learn?" after a presentation on developmentally appropriate learning activities for preschool children.

Encourage the small groups to share highlights from their discussion with the full group. This will give you a chance to check on how well the group has grasped the information you presented.

Practical application. Plan activities to reinforce the concepts you have presented and to help participants transfer this information to their own work settings. Here are a few sample ways to conduct this part of the agenda.

- * **Role Play:** Have participants role play a situation that takes the information you shared to their work setting. For example, during a workshop on parent conferences, invite participants to play the role of two parents and one teacher discussing a child who is unwilling to try new foods. You can break into groups of three to try this out or have three persons role play for the full group and then have the "audience" react to the role play. Encourage positive feedback. Then re-play the scene with new players.
- * **Problem-Solving Groups:** Break into groups of 4 - 5

persons and have them work through a sequence of:
(a) list the strengths of this issue; (b) list the weaknesses of this issue; (c) list strategies for resolving this issue. For example, at a workshop on fundraising, participants can list strengths of fundraising activities they currently use; then list the problems the fundraising activities present; and then list fundraising strategies that would build upon the strengths and avoid the problem areas.

- * **Using the Information:** Assign individuals or teaching teams a task to implement the topic information into their early childhood program. For example: in a workshop on learning environments, ask teaching teams to bring a drawing of their room arrangement; first check it against the principles you described in the Mini-Presentation; and then rearrange their room to better meet the needs of preschool children.

Be sure that any activities will truly meet the needs of participants at their work settings. Have a selection of several choices so that you will have at least one activity appropriate for your group.

Follow Through: Encourage participants to develop an action plan or a task plan that will help them take information learned at the workshop back to their work environment. Ask participants to list:

- * any changes they will make at their job site;
- * who will be involved in the transition; and
- * when the change steps will occur.

Talk with individuals as they make these plans. Help them consider all the pieces that will be affected by any one change and concentrate on making realistic timelines.

Evaluation. An evaluation will help participants:

- * Think intently about what they have gained from the workshop; and
- * Provide useful feedback to the presenter on the format, content, presenter qualities and logistics.

Two sample Workshop Evaluations are presented in Appendix III-E and III-F. Both attempt to include a mixture of checklists (which are easy for participants to quickly complete) and comment sections (which are very valuable for presenters).

Respect the time that participants have put into completing the evaluations. Read their comments carefully and thoroughly. I've found that when I read the evaluations

SAMPLE WORKSHOP EVALUATION

WORKSHOP TITLE: _____

WORKSHOP PRESENTER: _____

1. From this workshop presentation, I learned . . .

2. After this presentation, I still have questions about, or would like to learn more about the following:

3. Please rate the following statements on a 1-5 basis.

1 = strong agreement 5 = little agreement

- a. I learned a lot at this workshop a. _____
- b. I can use what I learned today. b. _____
- c. I already knew this information. c. _____
- d. The presenter was helpful. d. _____
- e. The presenter was knowledgeable and interesting. e. _____
- f. The pace of the presentation was appropriate. f. _____
- g. The presenter was enthusiastic. g. _____
- h. Overall, I would rate this session: h. _____

4. Please add any additional comments you wish to make about the presentation.



Assignment # _____
County: _____
Consultant: _____

**WISCONSIN CHILD CARE IMPROVEMENT PROJECT
WORKSHOP EVALUATION**

1. Please check off the words that describe your child care program:
- | | |
|---|-----------------------------------|
| <input type="checkbox"/> Group Center | <input type="checkbox"/> New |
| <input type="checkbox"/> Family Day Care | <input type="checkbox"/> Existing |
| <input type="checkbox"/> Certified Provider | |

2. Please check all of the types of child care you provide:
- | | |
|--|--|
| <input type="checkbox"/> Infant/Toddler | <input type="checkbox"/> Full Time Child Care |
| <input type="checkbox"/> Preschool Age(3-5yrs) | <input type="checkbox"/> Part Day Child Care |
| <input type="checkbox"/> School Age | <input type="checkbox"/> Nursery School/Head Start |
| <input type="checkbox"/> Evening/Night Care | <input type="checkbox"/> Employee Supported |
| <input type="checkbox"/> Multi-generation Care | |

3. Please list the workshop(s) you attended:

Workshop	Presenter
-----	-----
-----	-----
-----	-----
-----	-----

4. Please rate the following statements on a 1-5 basis:

5 = Strong Agreement

1 = Little Agreement

- | | |
|---|----------|
| a. I learned a lot at this workshop. | a. _____ |
| b. I can use what I learned today. | b. _____ |
| c. I already knew this information. | c. _____ |
| d. The presenter was helpful. | d. _____ |
| e. The presenter was knowledgeable and interesting. | e. _____ |
| f. The pace of the presentation was appropriate. | f. _____ |
| g. The presenter was enthusiastic. | g. _____ |
| h. Overall, I would rate this session: | h. _____ |

5. What was most helpful about this workshop. _____

6. What was least helpful about this workshop? _____

7. Do you have any comments to make about the quality of the presenter?

8. Would you recommend this workshop to a fellow child care provider?
 Yes No If no, please explain. _____

Thank you for helping us maintain the high quality services of the Wisconsin Child Care Improvement Project.



immediately after the session I notice only the negative comments; if I wait until I have had a chance to relax and think through a self-evaluation of the workshop. I then notice that many people said positive things about me! Consider the sources: some people who were forced to attend your workshop may have decided from the onset that they already knew everything there is to know. Other people may be trying to impress you with their knowledge. Most people are respectful of you simply because you asked for their opinion! One last suggestion--always total the ratings and average them out. Often a couple of low scores are balanced by mostly high ratings and you realize that while there were two people for whom you "didn't make their day," there were 38 others who were pleased to have spent their time with you!

Resources. As mentioned earlier in the piece on the Mini-Presentation, a compilation of resources help participants in two ways:

- * It verifies your sources; and
- * It gives sources to explore for further reading.

This is often the item most requested by participants. If the adults learned valuable information from your presentation, many may wish to see if they can get more good ideas by checking your resource list. Similarly, if you find a resource with a variety of exemplary forms or a collection of games for children you will want to share the resource with participants and not need to copy the games nor explain them in great detail.

Agenda Sample II

This agenda format focuses upon the experience and expertise of adult learners. It clearly places the workshop leader as a facilitator. The central theme is to draw upon previous experiences of the participants to derive concepts or principles. You will need to enhance your skills with group dynamics. It can be modified to a short workshop session or easily work with a half or full day session.

This workshop format will be most appealing to teachers who have had several years of experience in working with young children. It may make new teachers feel even more insecure about their lack of anecdotes to share. Be sure to include opportunities for people new to the field to participate. This process requires a workshop leader who is well versed and has much practical experience with the subject. It also requires someone who can think on their feet.

Situational activity. Present the adults with an activity which helps them ponder their experiences with key concepts of your topic. Examples will describe this format:

- * For a workshop on large motor activities for young children, set up large motor games and activities around the room; have each small group of adults play one activity and then list the skills practiced by that activity and the role the adults could play in facilitating child growth with that activity.
- * In a workshop on communication, ask each to bring a brief list of the follow up questions they asked after reading a story to the preschoolers. Once each shares their observation with others in their small group, define open and close-ended questions and then ask the group of participants to assess each question as open- or close-ended.
- * For a workshop on problem solving activities ask each participant to describe a problem they recently solved: who assisted them; what steps did they go through; how long did it take; what was learned from the activity. Once they have shared this with their small group, ask the group to summarize the role adults played and the steps taken to the full group.
- * For a workshop on orientation of staff, ask each participant to describe their orientation process to their first job of being a preschool teacher. Ask them to answer the questions: who conducted the orientation; what information did you remember; what information did you want to know? After the small groups discuss each persons story, ask them to summarize the responses to each question to the full group.
- * A workshop on daily routine could begin with an assignment to the small groups: Develop a daily routine for a group of two year olds and a group of four year olds in a full day child care center. Another group develops a schedule for a family day care home with eight children ages 1 - 4 years. List times of the day and activities.

Derive principles. The workshop facilitator will need to develop a list of points or principles to be addressed by the workshop. This information will pull together the situational responses of the participants. As groups finish sharing the summaries of their discussions, the workshop presenter lists points shared by the groups on a chart for all to see. The workshop facilitator attracts the attention of the full group and shares the list of key principles or points she has prepared. As each point is mentioned, the leader uses an example from the small groups to defend the principle. Each point may be further substantiated with research examples.

For example, during the workshop on daily routines the workshop leader shares a principle of: Balance active and quiet periods of the day. She then refers to the schedule of Group A in which Circle Time was followed by Free Play. Finally, she refers the group to a study that measured children's attention span and studied their alertness in daily routines and child development theory.

This is the time for participants to raise questions and discuss differing opinions or points of view.

This style of workshop recognizes that many competent preschool teachers know how to teach but may need assistance in conceptualizing why they teach the way they do so that they can teach that way more often.

Practical application. The next step is to relate the principles back to each participant's work setting. Following the example of a workshop on daily routine, the workshop leader may assign each person the task of assessing their own or sample daily schedules according to the principles presented and adjusting it to best meet the needs of young children.

It is important that participants have something they take with them to "use on Monday morning" if you hope for follow through from the workshop.

Follow through/workshop evaluation/resources. The workshop concludes with a similar set of steps to plan for follow through, to evaluate the workshop and to share resources for further information with the participants as described in Agenda Sample I.

Agenda Sample III

This approach is a combination of drawing upon the expertise of the participants and the sharing of didactic information by the workshop leader. It is helpful to teachers with a range of years of experience as it tries to meet all needs and skill levels. It is suited to a brief workshop session or a full day training event. It includes the use of an audio-visual material to reinforce the lecture presentation.

Inquiry approach questions. The workshop presenter poses a question to the participants prior to or upon arrival at the workshop session. Here are examples of inquiry approach questions:

- * How do children learn?
- * How can parent volunteers be used in a preschool?

- * What are the pros and cons of computers in the preschool classroom?
- * What fine motor skills should be developed in four year olds?
- * Develop a list of Early Childhood Professional Ethics

The participants are asked to share their responses with small groups or the full workshop group.

Objectives. The workshop objectives are prepared by the workshop leader and agreement on them is sought from participants similar to that process described in Agenda Sample I.

Didactic information. The workshop presenter has prepared information to share with participants that clarifies or questions the responses they have given to the inquiry questions. Again, the presentation should be brief and should include a research or theoretical base that is complemented by practical experience anecdotes. The participants are encouraged to ask questions to clarify the information presented.

Transition. A film, a slide/tape, a filmstrip, or a video tape is used to reinforce the concepts presented in the lecture presentation. The purpose is to bridge the audience from knowledge and comprehension to practical application. Choose audio visuals that show preschool classrooms which demonstrate the concepts presented and help participants see how the information relates to a real work setting. An example would be to show the video tape, *Celebrating Early Childhood Teachers*, (NAEYC, 1986) after a speech on professionalism.

Hands on experiences. This item brings the learning experience directly to the work settings of the individual participants. This activity may be to develop a list of ways parent volunteers can help in the classroom or to set up a plan for how the participants will improve the professional image of early childhood teachers in their own communities. A favorite of many teachers, both new and experienced, is to use this time for a make and take session; in other words, the teachers in a session on science activities may review science games and then make one game of their choice at the workshop.

Follow through/workshop evaluation/resources. The workshop concludes with a similar set of steps to plan for follow through, to evaluate the workshop and to share resources for further information with the participants as described in Agenda Sample I.

Agenda Sample IV

This agenda format is perhaps the one most commonly used and perhaps most often abused by adult educators. Its usefulness may be as a format for workshops of one hour or less that are presented at large early childhood conventions. Its purpose is to transmit a large amount of knowledge in a small amount of time. With care, it can be a helpful format in these limited settings. It does not, however, allow for self-directed, experiential learning.

Objectives. The workshop objectives are prepared by the workshop leader and agreement on them is sought from participants similar to that process described in Agenda Sample I.

Didactic information. Again, present information in the form of points or principles introduced by a research or theory base. Share anecdotes of real experiences in early childhood settings to substantiate your points. Audio visual materials may be used to reinforce your remarks and to make it clear that your ideas can be implemented in a preschool classroom. Whenever possible, allow time for participants to share ideas or examples of their work with each other.

Group discussion. It is essential that you allow time for questions and answers; if participants are reluctant to ask, you may have a list of questions you anticipate. Offer them as questions and see if anyone wishes you to discuss them. Finally, suggest that participants consider an action plan. You might pose a few topic questions to spark their discussion with colleagues who came to the convention together.

Follow through/workshop evaluation/resources. The workshop concludes with a similar set of steps to plan for follow through, to evaluate the workshop and to share resources for further information with the participants as described in Agenda Sample I.

A set of learning activities that may be useful as agenda items in any of the workshop formats are described in Appendix B: Learning Activities. These ideas may serve as a springboard for activities appropriate to your own workshop topic.

A final note on presenting workshops is to remember that workshops, as with other real life experiences, become easier with practice. You develop a greater ease in preparing objectives; you have a larger repertoire of learning games; and you will be more comfortable in speaking to a large group of your colleagues. If you feel you have good ideas to share with others and if you enjoy sharing your thoughts with other

adults, take the risk and offer to present a workshop at an early childhood conference. Take care to plan it thoroughly; take the evaluation suggestions seriously. If you enjoy it, do it again!

SECTION FOUR: SERVING AS A TECHNICAL ASSISTANCE CONSULTANT

An early childhood program has a problem; they cannot seem to solve it themselves. They seek aid from a consultant with expertise in their problem area. The consultant meets with one or two staff members and assists them to solve the problem for themselves. This is a technical assistance session. The skills of the consultant in the topic area, in working with colleagues and in problem solving will make or break the outcomes of the session.

This section will address the skills and process of serving as a technical assistance consultant. Information will be presented on: consultant qualities and styles; elements of consulting; principles of consulting; and the consultation process.

Consultant Qualities

As with a workshop, the consultant is the key to success or failure of a consultation session. In Exhibit IV-A, a list of **Technical Assistance Consultant Qualities** is presented. Look through the list and select ten traits that are most essential to a competent consultant. Compare your choices with your colleagues and discuss your responses. Then think about which traits you have; which qualities should you develop; which qualities should you improve; which qualities should you promote?

Consultant Styles

From my experience in identifying, training and assigning consultants for early childhood programs, I have come to see at least three observable consulting styles. I somewhat humorously refer to them as:

- * The **Take-Charge Model** OR: Follow Me and I'll Lead You to Paradise (or at least solve your problems for you)
- * The **Laissez-Faire** (French for "leave to happen") Model OR: Do What You Wanna' Do...
- * The **Colleague Model** OR: Let's Walk Together in Your Moccasins...

I'd like to describe each style briefly for you.

The Take-Charge Model. This consulting style says to consultees, "If only I had the time I could do your job, too." The consultant arrives with brief case, paper, pencil, lots of prepared forms and looking very business-like and competent. A consultant with this style tends to ask

questions--briefly listens to the consultee's answers--and then give the correct answer herself. This consultant style exudes a sense of power and control over the entire situation. The consultant merely tells the consultee "how to do it right." The consultant meets her own need for approval and recognition but meets few needs of the early childhood program.

The early childhood program may appreciate a quick solution to their problem with no pain or exertion of energy on their part, but the long term results are that the program staff have not learned the process of solving problems. They have one form that will work for one situation. Moreover, they end the day overwhelmed with a low self-esteem wondering, "Why can't I know everything like she does?" It may be an effective style for a person just starting an early childhood program and who needs lots of help in a hurry, but I'm not sure about that, either...

The Laissez-Faire Model. A consultant with this style tends to saunter in to the early childhood program, sometimes late, as she grabbed one more cup of coffee at the local bakery--"You've got a great bakery in this town." With brief case in hand, pencil and legal pad--and no resources--the consultant asks the program what the problem is and then asks how they think they'll solve it. This consultant often refers the early childhood program director to other programs or resources. And then leaves...

This style works well with self-directed, super-achievers who can solve their problems just by being able to air them with another person. However, if the center van driver would have stopped in the director's office for a cup of coffee, she'd have the same results without having spent \$150 for a consultant fee!

The Colleague Model. Naturally, you realize that this will be a style I find acceptable. A consultant with this style is self-confident and prepared to meet the needs of the early childhood program from which she will be paid! She recognizes that both she and the consultee have expertise; it just so happens that her expertise is in the particular area in which help is needed. She arrives on time, is well prepared with possible resources and looks at the technical assistance session as a problem-solving session.

The consultant gathers more information about the problem and then helps the program staff to develop optional strategies for solving the problem and prioritizing those options. She shares resources for further exploration and clarifies a task plan for resolving the problem before she leaves. She leaves exhausted and drained and the program staff watch her leave feeling that they, themselves, worked hard and solved that problem. The long term results are that

TECHNICAL ASSISTANCE CONSULTANT QUALITIES

trustworthy

confidentiality

enthusiastic

problem solving skills

prepared

knowledgeable

organized

thorough

respectful

flexible

self-confident

fair

poised

leadership

fun

honest

accepting

creative

competent

interpersonal relationship skills

sensitive

committed

ability to conceptualize

professional

decision making skills

they have gained experience with developing a task plan and with the strategy of defining problems and alternatives.

A consultant with this style receives a letter of appreciation from the early childhood program staff she assisted, similar to the one presented in Exhibit IV-B.

Elements of Consulting

In order to effectively work with your peers as a consultant to an early childhood program, there are certain elements that must be considered: preparation, setting the proper climate, listening actively, acting professionally and following through consistently.

Preparation. It is important that a consultant clarify the needs of the early childhood program with the contact person prior to the session. Try to obtain a clear picture of the early childhood program and the components that relate to this topic area. An organizational chart, job descriptions, staff qualifications, parent handbook, brochures, staff training manual, personnel policies, advertising samples, may all be helpful to receive in advance. Remember that until you arrive, it is difficult to establish trust between yourself and the program; many programs will not be comfortable sending you items until they have established trust with you.

The consultant must then collect resources, plan out a rough agenda and consider options for solving the problem. Again, preparation is key to the success of the event.

Set the proper climate. Upon arrival you will create an impression upon the program staff. Your appearance, your punctuality, your warmth and openness will be visible. Most importantly, the level of respect you demonstrate for them will be obvious and will set the tone for the entire session. Your style should exude respect for the program staff and their capabilities.

Spend some time in casual conversation; take a tour of the center; show some interest in the uniqueness of their program. Comment on strengths and make a mental note of problem areas. Carefully observe the setting to assess the organizational climate within the program and the staff.

Share with the program staff your rough agenda; ask them for suggestions; try to pin point the real problems.

Listen actively. A consultant is hired to aid an early childhood program in resolving conflicts or facing new tasks. The consultant's needs are unimportant. You must be selfless. Listen to what people are saying to you and what they are not saying. Treat all information they give you

Exhibit IV-B

Sugar Sweet Child
Development Center
105 Lucky Lane
Sugartown, Wisconsin

Dear Consultant,

Thank you for planning in advance of the on site consultation. It shows that you have a commitment to our program and a recognition of our needs.

Thank you for asking questions to help you better understand the uniqueness of our early childhood program. Your openness indicates your respect for our uniqueness.

Thank you for coming to us without a "package." It shows you acknowledge our ability to think for ourselves.

Thank you for feeling out the politics within our program. We struggle with them everyday and the follow through from your work today is greater since you understand our limitations.

Thank you for being an active listener whom I can trust; sometimes I feel so isolated here, and I'm glad that after you leave I don't have to worry about what I said to you.

Thank you for appearing to have all the time in the world for us, but for not using all of OUR time.

Thank you for asking for our feedback; it shows that you are a professional.

Finally, thank you for leaving us with new challenges and new ideas; it validates our belief in ourselves and our work!

Sincerely,

Self Worth
Early Childhood Director

with confidentiality.

Act professionally. In your appearance, your written information, your resources, your conversation, your manner, you must exude a sense of professionalism. Demonstrate respect for the program staff; maintain confidentiality about other programs with which you have consulted as well as with any information shared with you by this program; demonstrate fairness and flexibility with your remarks; speak positively about other early childhood professionals; encourage the program staff to become involved in early childhood organizations, such as NAEYC; and help the program to strive for high quality services to children and families.

Follow through. A competent consultant is responsible in following through on tasks assigned to her. If she offers to send a bibliography that she has at her office, she does so immediately. Place a telephone call to the program a couple of weeks after the visit and check on progress. Is more information needed? Have they been slowed down by too many tasks? Can you help over the telephone or by sending additional printed materials?

Consulting principles

A set of principles to be considered by a consultant are presented in Exhibit IV-C. These principles will guide you to best meeting the individual needs of programs with whom you consult.

The Consulting Process

There are seven steps in the process of providing technical assistance to an early childhood program: assessing the gap; determining the problem; brainstorming options; prioritizing the options; setting a task plan; assessing further needs; and evaluating the session.

Before arranging the consultation session, a request form may be filled out between the consultant and the requesting early childhood program. A sample Technical Assistance Request Form is included in Exhibit IV-D.

Assessing the gap. A consultant must assess the gap between where the program is and where they want to be with respect to the particular topic issue. For example, if a program is 50% full but wishes to achieve a level of 85% enrollment the consultant will help them determine strategies to increase significantly the enrollment. What are the consultee's objectives; Is there a hidden agenda? Here are some sample questions to help answer those questions:

- * What difficulties have you faced with this problem?
- * How does this problem affect other areas of your

PRINCIPLES OF TECHNICAL ASSISTANCE

1. Technical assistance occurs in a calm, uninterrupted, adult-like environment.
2. The customer requests the help and the customer, with assistance from the consultant, determines their own needs.
3. The customer is always right---the consultant adapts.
4. A consultant provides options, not answers. The customer determines the solution. The consultant checks for closure but the customer implements the task plan.
5. Technical assistance is based upon respect for the knowledge and potential of the customer.
6. Technical assistance sessions must meet the needs of the customer, not those of the consultant.
7. A technical advisor must have self-confidence in their knowledge and skills about the subject area, about problem solving skills and about personal dynamics.
8. A consultant presents useful, practical information and facilitates the decision making process. The customer takes and deserves the credit for making the solutions work!
9. A consultant is a guest, often a one-day stand. The customer has to come back tomorrow and work out the task plans.
10. Technical assistance is conducted with a professional flair.

program?

- * What have you tried so far to deal with this?
- * How does your Board (your staff, parents) feel about the nature of this problem?
- * What concerns you most about this problem?
- * What are your greatest fears about this problem?
- * What seems to be causing the problem?
- * What do you want to see happen?
- * What don't you want to have happen?
- * Is anyone else in your program affected by this problem? Should they be here at this meeting?

Determining the problem. It is important for you to state the problem or to have the program staff members to state the problem. Make it clear that is the issue to be addressed. Here are some opening lines...

- * From what you've said it seems to me that you are facing the problem of....
- * It seems that you have decided that you need to...
- * The problem seems to be....
- * Am I right in assuming that you feel you need to...
- * Is that the issue as you see it?
- * Our task seems to be, then, to...

Be sure to gain agreement from the program staff. "Do you see it that way? Is that the problem you see?" Often times this clarification of the problem is the time when you draw out the hidden agenda or unmentioned problems. For example, using the earlier scenario of enrollment problems:

Consultant: So, you are saying that you would like to work on ways to increase your enrollment of children to 85% capacity. Is that right?

Program Director: Well, I know how to increase the enrollment; we just need to get rid of all the unlicensed child care in the community that's so much cheaper than ours.

Consultant: You're saying that you need incentives for the illegally unregulated care to become licensed?

Brainstorm options. Ask the consultees to suggest possible options; The consultant should guide the staff through this process and offer suggestions or possible ideas when there is a significant lull. Here are some ways to phrase your offers:

- * Have you ever tried...?
- * Have you considered.....?
- * What about...?"
- * I know of one program that did this...?
- * How do you think you would feel about...?

Remember that the program staff know much, much more

TECHNICAL ASSISTANCE REQUEST FORM

Wisconsin Child Care Improvement Project

Name: _____

Address: _____

Telephone: _____

Please describe how we can help you:

When would you like to receive this help?

Please give us the following information about your program so that we can best help you:

- certified provider
- family day care
- group child care center

new OR existing child care program

PLEASE SEND THIS REQUEST TO:



about the community within and outside of their early childhood program. Some ideas you have may work; some definitely will not. If staff do not like your ideas, they will not exert energy to implement them. You are truly an outside resource person; that gives you advantages and sets limits on your role in this process.

Prioritize the options. Consider the good and bad points of each strategy. Your role is to lend credibility and reality to this process. You must also serve as negotiator. If you see flaws in many ideas, show approval for other ideas that are acceptable. Then help the consultees prioritize the acceptable strategies. It is always helpful to have several strategies that could work. This way, if one fails during the implementation phase, the group still has alternative plans to try out.

Set a task plan. The consultant helps people develop a task plan to delineate what strategies will be implemented: how, who, when and what will occur. A good task plan lists:

- * What is the problem?
- * What will be accomplished?
- * Who will do it?
- * Who must give approval?
- * By when?
- * What will be the results?
- * How will we know if it worked?

Again, serve as a mediator amongst conflicting opinions; questions such as, "How could you make that work?" will help the group or individual over small hurdles. Also serve as the reality factor. Sometimes people get so excited about an idea that they set unrealistic timelines and goals. Help them see why it won't work or why it will take more time. Often, too, task plans include tasks to be performed by others not present. For example, if a program wants training for teaching staff and they suggest asking the local college to design a Child Development Associate (CDA) training program by next semester, you need to help them make contingency plans if the college cannot meet the timeline.

After you have set out several strategies, take the leadership role in reviewing the plans listed and check that everyone agrees to each piece. It is most desirable to write out a plan; sometimes it will seem too formal. The consultant must help the program staff find some way to check that the plan is being implemented and to evaluate its success.

One word of caution: The task plan is that of the early childhood program. It is imperative that the task plan be developed at the technical assistance session; if a consultant prepares the task plan for the program after the

session, the program staff have no ownership over that plan and may not even look at it. They will keep the written plan you develop together and may or may not send you a copy for your own information.

Assess further needs. The consultant should invite the participants to suggest areas in which they will need additional help in the form of consultation, of resources, or of training, in order to meet their task plan. This is a good time for the consultant to gracefully and professionally suggest things she has noticed as potential problems:

- * Keep in mind that if you have trouble carrying out this task, you might want to call another early childhood program to see how they do it...
- * You may find as you work on this task that problems might surface in...

The consultant may offer to provide on-going assistance as needed, either over the telephone or in person for additional consultation charges.

Evaluate the session. Be sure to provide an evaluation form for the program staff to evaluate your services. Check on logistics, content, your style, your knowledge and whether or not you met their needs. A sample **Technical Assistance Evaluation Form** is presented in Exhibit IV-E.

This information will help you improve or promote your skills as a technical assistance consultant. You may want to include a line that asks for permission of the program to use their evaluation comments in your advertising. That must go on the form.

- * May I use your comments and your name in any promotional material that I distribute?
___Yes ___No

If the party does not check either yes or no, you do not have permission to use their comments.

The requests for individual consultation by early childhood programs are increasing as program staff find this to be a cost effective and time-saving way to address difficult issues within their program. You may find it to be a rewarding way to make greater use of your skills in early childhood education and in interpersonal relations.

SECTION FIVE: SELLING YOURSELF AS A CONSULTANT

If you are interested in contracting with early childhood programs as a consultant, you will need to develop a plan to establish yourself as a competent consultant. The business school textbook version of marketing strategy suggests that there are at least four variables to consider: place, product, price, and promotion. In other words, you must conduct the best promotion for the best product in the best place at the best price. Each of these variables will be addressed in this section. But we must begin by targeting your potential clientele or customers.

Target Your Customers

All of your marketing efforts must focus upon your potential customers. Your customers will at a minimum include the family day care providers or directors of early childhood programs. They are the ones who have the authority to purchase your services. Often, though, early childhood teachers will attend a workshop you present and will recommend you to their director. Also, training institutions, resource and referral agencies and Head Start regional office staff that support early childhood programs will either hire directly or refer competent consultants to the early childhood programs they serve. Keep an eye out for additional reference points for your services.

Place

Before you promote your services, you need to define your service area. How far will you travel to consult; are you willing to travel overnight; are you interested in a national perspective. Keep in mind that most programs are not interested in paying for time spent travelling-- unless you are very famous. If you must drive eight hours to get to a consultation site and eight to return, is the fee worth the time and effort?

Some people begin consulting close to home. There seems to continue to be a magical distance that you must travel away from home, particularly if home is a rural area or small hometown, to be considered an "expert." My advice is simply that you may find it easier to begin consulting with programs within a 100 mile radius of your home and build your reputation.

Product

You need to be specific about what services you can provide. Here are some questions to ask yourself:

- * Which early childhood settings will I consult to (do I have expertise in): child care, family day care, Head Start, part day preschools?
- * Which ages of children am I comfortable with: infants, toddlers, preschoolers, school agers?
- * What size of center do I know well: less than 30; 30 - 50 children; 50 - 150 children; over 150?
- * With which topics do I have expertise: curriculum, administration, teacher training, etc.?

Many famous consultants, or keynote speakers are often accused of giving the same speech at every conference for five years. I'd suggest modifying that slightly: you will make the most use of your time and effort if you prepare a couple of workshops each year and promote those topics to different groups. Do beware of presenting the same topic to two conferences that may include many of the same attendees.

How do you know what topics to prepare or to promote for workshops or technical assistance sessions? Attend every early childhood conference and see which workshops are full. Talk with your colleagues at the conferences and see what issues are discussed often. Read the early childhood journals and keep abreast of the latest "hot topics." Then see what skills you have that match the current needs or demands.

Your workshop and technical assistance evaluations will give you feedback to improve your presentations or consultations. Consider the comments sensibly. Remember that you must have a good product to sustain your consulting business.

Price

The price you charge will depend upon your academic qualifications and your years of practical experience in the field. Some programs have a set fee they can pay for a masters degree consultant and for one with a bachelors degree. Other programs will consider your fee simply upon the quality of your work. Will you build your travel costs into your fee or will you bill separately for travel costs. Clearly, if you set a high fee, you will price yourself out of the market for many early childhood programs. However, if you set a low fee, you may not feel it is worth your extra time and effort.

Consider the amount of time you will need to prepare your materials. I often find that it takes twice as long to prepare a workshop as it does to present. But while a workshop often lasts for a few hours where a technical

assistance session may last for an entire, intense day.

Ask other consultants what they charge. See where you fit within their range of expertise and experience. You will learn the hard way that when asked your fee, you can always negotiate it down to meet the program's financial situation. However, once you set a fee and the program jumps at it, you can never go back and ask for more!

Consider a lower fee initially until you build a positive reputation. Certainly, you will be paid more to do a national level consultation job than you will get paid in your home territory.

Very few people in any field earn a full salary from consulting. Very few people last as a full time consultant for more than a few years. This is due in part since your services are desirable because you have a job that keeps you abreast of current conditions in the field and partly because of the sporadic and inconsistent nature of the job. This is definitely not a "get rich quick" scheme, but it can be a marvelous opportunity to learn about how other programs serve children and families while you earn a little extra money.

Promote

There are two basic methods for promoting your services: free publicity and paid advertising. Ideas will be shared for both.

Publicity. Begin your promotion by taking advantage of ways to publicize your services, to increase your visibility (name recognition) at no cost to yourself. You may try any or all of these tried and true methods:

- * Present free workshops at every regional, state and national early childhood education conference you can
- * Write articles for local, state and national early childhood journals
- * Serve as an officer in local, state and national early childhood organizations
- * Develop positive relations with other early childhood professionals--hitch your wagon to a star--to promote word of mouth publicity

Advertising. Once you begin to get paid for your consultation services and decide you want to expand your efforts in this direction, you will want to begin some forms of advertising to sell your services. Here are a few ideas:

- * Develop a logo and have business cards, memo sheets

and stationery printed---and use them freely

- * Develop a brochure with your photograph and describe the topic areas, settings, fees you offer--use positive comments from your customers
- * Purchase an ad in any of the early childhood journals or newsletters
- * Send a letter of introduction to all early childhood programs in your targeted service area

Remember that, as in the child care business, word of mouth advertising is your best promotional strategy. In order to maintain word of mouth advertising, you need to continue to be visible in the early childhood field in your service area and you need to maintain a high quality of services. If you falter in either area, your requests will diminish.

Ethics

I must close with one word about professional ethics. To many in this fledgling field of early childhood, self-promotion is seen as tasteless. While we recognize that to survive in the future of early childhood education, our programs must develop a greater sense of business management skills. We must similarly accept the emerging position of consultation. Good consultants who sell themselves well will reap the benefits. That is the fact of capitalism, free enterprise and competition. But, the essential ingredient here is quality. You must maintain a deep commitment to professionalism while both promoting yourself and while delivering your services.

**APPENDIX A: THE WISCONSIN CHILD CARE IMPROVEMENT PROJECT:
CONSULTATION PROCESS**

The Wisconsin Child Care Improvement Project (WCCIP) is funded by federal, state and private funds to start up and improve early childhood programs throughout Wisconsin. One key ingredient in that scope of work is to provide on site consultation for new or expanding early childhood programs. A computerized Consultant Pool was established to meet the requests for technical assistance. The process of providing consultation through the WCCIP occurs through a set of steps. Each is briefly defined here.

Step 1: Consultant Application

A Consultant Application form (Appendix A-1) was designed to enroll potential consultants from throughout the state of Wisconsin. (The form was adapted from one used by NAEYC.) Those consultant names are placed in the computerized pool which was set up using the Lotus 123 spreadsheet format, with an IBM PC-XT computer with expanded memory. Each category of the application form was listed as a column on the spreadsheet so consultants can be sorted by geographical area, area of experience and any area of expertise.

Step 2: Technical Assistance Request

The Technical Assistance Request form (See Exhibit IV-D) is distributed to early childhood programs in the areas served by the WCCIP grants. When a need arises for an early childhood program, center based, family day care, school age child care, etc. to open or to expand, a request is submitted to the project office for technical assistance. This form asks the early childhood program to delineate its needs.

Step 3: Match Consultant to Consultee

Upon receipt of the Technical Assistance Request form, the WCCI project staff contact the requesting program to clarify its needs. Once completed, the computerized Consultant Pool is searched for a consultant who matches the need. Consultants are selected for their geographical proximity, their experience and their areas of expertise.

Step 4: Assign a Consultant.

The project staff contacts the selected consultant to request her services to meet the technical assistance need. The consultant is offered a specific fee and travel allowance

WISCONSIN CHILD CARE IMPROVEMENT PROJECT

CONSULTANT APPLICATION FORM

Name: _____ Position: _____ Mailing Address: _____ _____ Office Phone: () _____ Home Phone: () _____	Background/Expertise ___ trainer ___ researcher ___ educator ___ center administrator ___ center teacher ___ other: _____ ___ family day care provider Age Groups in Which You Specialize ___ infant ___ preschool ___ college ___ toddler ___ school age ___ adult
---	--

I am available to:

- ___ serve as a presenter for statewide/regional conferences
- ___ serve as a consultant to businesses interested in supporting child care
- ___ serve as a consultant to:
 - ___ Group Child Care/Early Childhood Programs
 - ___ Family Child Care Providers
 - ___ Certified Child Care Providers
 - ___ Registered Child Care Providers
- ___ travel for child care consultation within:
 - ___ my local area
 - ___ a 150 mile radius of my home (no overnights)
 - ___ Wisconsin (including overnight travel)
- ___ consult by telephone
- ___ respond to requests by the media
- ___ consult in other states
- ___ serve as a keynote speaker for statewide and regional conferences
- ___ volunteer to speak to local AEYC affiliate groups in Wisconsin
- ___ volunteer to write guest articles or reviews of resources for the WECA/AEYC Newsletter

I am comfortable providing the following types of training and technical assistance for child care providers:

- ___ Individual one-on-one consultation
- ___ Telephone consultation
- ___ Small group consultation
- ___ Workshops
- ___ Seminars
- ___ Teleconference sessions (ETN, SEEN, Meet Me Bridge, etc)

Please list the consultant fee you charge:

- ___ per day
- ___ per keynote presentation

APPENDIX A-1

 Please check your areas of expertise. Add any topics or experiences not listed.

- | | |
|----------------------------------|--------------------------------|
| --- administration of programs | --- Head Start |
| --- financial | --- health/safety/nutrition |
| --- personnel | --- history of ECE |
| --- policies | --- legal issues of child care |
| --- art | --- math/number |
| --- buildings/locations | --- media/public relations |
| --- CDA | --- Montessori |
| --- child abuse | --- movement/dance |
| --- child care employee issues | --- multicultural/multilingual |
| --- child development | --- music |
| --- cognitive | --- parent cooperatives |
| --- emotional | --- parent education |
| --- language | --- parent involvement |
| --- physical | --- Piagetian theory |
| --- sex roles | --- play |
| --- screening | --- playgrounds |
| --- social | --- pre-reading |
| --- children's literature | --- public policy |
| --- church-related programs | --- resource & referral |
| --- computers | --- science |
| --- administrative use | --- special needs children: |
| --- children's use | --- physically disabled |
| --- creative dramatics | --- developmentally delayed |
| --- curriculum development | --- gifted |
| --- early intervention programs | --- social development |
| --- employer support/sponsorship | --- staff/child interaction |
| of child care | --- guidance/discipline |
| --- environment/space | --- staff development |
| --- equipment/materials | --- start-up of child care |
| --- evaluation of programs | --- teacher education care |
| --- families | --- video-film |
| --- parent involvement | ----- |
| --- single parents | ----- |
| --- teen parents | ----- |

 Please list any additional comments or questions:

 Please enclose your vita or resume'. Return to:

Wisconsin Child Care Improvement Project
 NECA/AEYC
 3510 Monroe Street
 Madison, WI. 53711

based upon the anticipated number of days required to meet the need and is queried as to availability within the timeline requested by the early childhood program. Certainly, the consultant is asked to verify her expertise and comfort level with the topic and program setting.

Once this is confirmed, a written subcontract is sent to the consultant and verification is sent to the program.

Step Five: Confirm the Technical Assistance Session.

The consultant is asked to contact the early childhood program by telephone to clarify the need, to arrange a mutually convenient date and to set the logistics for the session. This also gives the consultant and the program staff a chance to initiate contact and will make it easier to be at ease when the technical assistance session occurs.

Step Six: Conduct the Technical Assistance Session.

The consultant arrives on time and conducts the session as a problem solving session. The consultant has collected resources that are appropriate to the topic, including those of the WCCI project. She refers the program staff to other services of the WCCI project as well as to outside sources of expertise.

Step Seven: Evaluation

The consultant gives an evaluation form (see Exhibit IV-E) to the contact person of the early childhood program. This form is returned to the WCCI project office. A copy is sent to the consultant and a record is made of the rating.

Step Eight: Consultant Report

Upon completion of the technical assistance session, the consultant completes a Consultant Report Form (Appendix A-2) to submit to the WCCI project staff along with her consultant fee and expense vouchers. This report is reviewed for the content of the technical assistance session and for any additional needs identified of the early childhood program.

Step Nine: Follow Through

The WCCI project staff contact the early childhood program within two days to obtain their feedback and offer additional assistance.

The consultant contacts the early childhood program staff a couple of weeks after the session to check on their progress and suggest additional sources for on-going help.

WISCONSIN CHILD CARE IMPROVEMENT PROJECT
CONSULTANT REPORT FORM

Consultant: _____
Date of Assignment: _____
Child Care Program/
Provider: _____
City: _____
County: _____

REPORT OF CONSULTANT WORK/ACTIVITIES

<u>Time</u> <u>Allocation</u>	<u>Description of Work</u>	<u>Persons</u> <u>Involved</u>
----------------------------------	----------------------------	-----------------------------------

1.

2.

3.

4.

5.

6. please describe additional consultation/technical assistance or follow up that is needed by this program:

7. Would you be willing to provide further assistance to this child care program/provider: yes no
Explain: _____

APPENDIX A-2
ASSIGNMENT # _____

8. Please list any referrals you recommended to the provider: _____

9. Please list all resources you left with the child care provider: _____

10. Please list any information/resources that you request be sent to the child care provider by the Wisconsin Child Care Improvement Project: _____

11. Please evaluate the quality of your consultation to this child care provider/program:

_____excellent _____good _____fair _____poor
Please describe: _____

12. List the name of the Child Care Administration Fact Sheet which you developed: _____

13. List the date and topic of the ETN(Educational Telephone Network) Session that you will provide/have provided:

Date: _____ Topic: _____

signature of consultant

date

Please submit the completed Consultant Report Form within two weeks of the assignment date. The Consultant Report Form must be submitted before the Consultant Expense Voucher will be processed.

Submit both forms to:

Wendy Hinrichs Sanders, Director
Wisconsin Child Care Improvement Project
PO Box 369
Hayward, WI. 54843
715-634-3905

Thank you for your prompt attention!

APPENDIX B: LEARNING ACTIVITIES

Word Association

Ask participants to jot down on a piece of paper all the words they associate with a word given by you. Give them 3 - 5 minutes and then ask the group to share their words which you write down on a piece of chart paper. Here are some words you might use. What do you think of when I say:

- * Discipline
- * Teacher
- * Child development
- * Education
- * Emotions
- * Personnel policies

Definitions

List a "new" concept word at the top of a sheet of chart paper. Ask participants to brainstorm all the words that define that concept. You may begin with: "What words define the concept..."

- * Teach
- * Learn
- * Classification
- * Problem-solving
- * Professional
- * Parent involvement

Sort

Break participants into groups of 3 - 5 persons. Ask them to sort statements into one of two categories. Use statements of teacher observations, such as "Ms. Jones read a story about 'Ping, the Duck' to her group." Here are some groups you might sort them into:

- * Teacher directed vs. child directed activities
- * Teacher behaviors that extend, sustain or stop children's learning
- * Developmentally appropriate vs. developmentally inappropriate activities

Classify

Give participants a paper sack full of objects found around the home. Ask them to sort them into groups and then describe to the full group what their classifications were. Examples might be:

- * Soft vs. hard

- * Smooth vs. rough
- * Things for children vs. things for adults
- * Toys vs. work objects

Find the Person

Ask participants who are new to each other enter the room, give them a list of characteristics. Ask them to find a person in the room who meets each of those characteristics and introduce themselves. Here are some possibilities. Find a person who:

- * Has been a teacher for more than 5 years
- * Has been a teacher for less than 1 year
- * Tells a funny story about children
- * Has driven the furthest to attend today
- * Lives the closest to this place
- * Has a dog for a pet
- * Has ever had a pet turtle
- * Has a gerbil in their classroom
- * Has a child in their group who whines often
- * Has a child in their group who is always happy.

Matching Game

Remember the old TV show, The Match Game? Play this game similarly. Break participants into groups of three each. You call out a word and each person writes down, on an index card, the first word that comes to their mind. Then all three in each group show each other; if all three match, they win--absolutely nothing! These might be words for you to try:

- * Child _____
- * Teacher _____
- * _____ child care
- * Parent _____
- * School _____
- * Block _____
- * _____ day
- * Child care _____
- * _____ behavior

One-Liners

Give each participant a slip of paper and pencil. Ask them each to write one sentence to describe themselves with respect to a topic you give them. Here are some to start with:

- * Your teaching style
- * Your personality
- * Your center
- * Your staff

- * Your group of children
- * Your group of parents

Take a Picture

Give each person an index card and a pencil. Instruct them to visualize walking into their classroom or family day care home at 11:00 a.m. on Friday. Their task is to list everything they see. Share lists--you may add on the sorting game and have people sort the things they see into open or closed toys/equipment.

Write a Slogan

Ask each participant to write down a "less than one sentence" slogan to describe their early childhood program. Share with the group.

Wish Upon a Star

Instruct participants to think about this idea: If you could make one wish about your job--your work situation--your early childhood setting--the parents you work with--the children you work with--your colleagues--what would it be? Some people may want to share, others may not. Relate the wish to the topic of your workshop.

Draw a _____

Ask participants to form a pair. One member of each pair will have a pencil and paper; the other member will have a cue card of the name of something to draw. That person must give the drawer directions without naming the object to be drawn. For example, the cue card might have a picture of a square. The teller will describe "Draw four lines of the same length that connect at each of four 90o angles." Here are some pictures you might ask:

- * Circle
- * Balloon
- * Triangle
- * House
- * Sailboat

This activity will focus both on cooperation amongst adults as well as about the difficulty children face when learning new concepts.

I Feel...

As they arrive, give participants a piece of paper with three circle faces on it; one has a smile, one a straight face, and one a sad face. Ask each to circle the face which describes how they feel upon arrival. When the full group is

present, you may ask them to share their feelings and reasons. You can also use this during a workshop day as a way to check the trust and stress level within the group.

Describe the Perfect...

At the top of a piece of chart paper write the words: The Perfect _____. Ask participants to describe for you their image of the perfect _____. Some "perfects" you might try to describe, include:

- * the perfect teacher
- * the perfect parent
- * the perfect child
- * the perfect early childhood center
- * the perfect early childhood workshop.

The Wish Book

Bring early childhood catalogues to the workshop. Give each person a catalogue and ask them to choose five toys -- for any amount of money--they may "buy" for the children in their center. When they have finished, ask them to share their toys and why they were chosen.

Your Own Definition

Ask participants to write their own, one sentence definition of a concept that is the focal point of your workshop. Definitions can be shared with the full group and then be sure to give people a chance to refine their definition before the end of the workshop. For example, a workshop on guidance and discipline could request a definition of "guidance and discipline."

A variation is to ask participants to list elements they would include in a policy statement. For example, a transportation policy, a policy for volunteers, a policy on discipline, a policy on learning activities.

Give Us Your Best

Ask workshop participants to form a pair. One person will be the interviewer; one the interviewee; and then reverse. The interviewer interviews the candidate for a lead teacher position. The questions to be asked are:

- * Tell me about why you feel your education and experience qualifies you best for this job.
- * Share with us one teaching episode that demonstrates your skill as a preschool teacher.

Upon completion, each introduces the other to the group.

TRAINING AND TECHNICAL ASSISTANCE

A CONSULTANT TRAINING SESSION

AGENDA

- 9:00 Registration & Refreshments
- 9:30 Introductions
"What do you hope to learn today?"
"What do you dream of doing with your consulting skills?"
- 9:50 Objectives of this Workshop
1. The participant will identify adult learner needs
 2. The participant will recognize training and technical assistance as a cycle
 3. The participant will define a variety of workshop session formats
 4. The participant will be able to implement a technical assistance consultation process
 5. The participant will consider a plan to sell their skills as a consultant
- 10:00 Working With Adult Learners
- * Situational Activity. Describe something you recently learned how to do. Why did you learn it? How did you learn? Who helped you?
 - * Discuss Principles in Working with Adults
- 10:45 The Training and Technical Assistance Cycle
- 11:00 Training Early Childhood Staff
- * Trainer Qualities
 - * Workshop Formats
- 11:30 Group Discussion/Practical Application:
- * Describe an excellent workshop you attended. What was the agenda like? Why did you enjoy the workshop?
 - * If you are planning to present a workshop, discuss the format with your colleagues. What needs assessment could you use? What discussion or practical application activities could you do?
 - * Given a workshop agenda, how would you improve it?

12:00 L U N C H

1:00 Serving as a Technical Assistance Consultant

- * Consultant Qualities
- * Consulting Principles and Process

1:45 Group Discussion: Consulting Issues

- * Brainstorm issues/problems that may arise
- * Break into small groups
 - What are the strengths of the issue
 - What are the weaknesses of the issue
 - What strategies could overcome the weaknesses
- * Re-Group and Share Strategies

2:15 The WCCIP Consultation Steps

3:00 Selling Your Skills as a Consultant

- * Place
- * Product
- * Price
- * Promotion

3:15 Evaluation of this Session

3:30 Adjourn

Have a safe drive home!

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**WISCONSIN CHILD CARE IMPROVEMENT PROJECT
CONSORTIUM MEMBERS AND STAFF**

CONSORTIUM

WECA

Betty Cleworth, Past President
B & J Learning Centers
900 Second Avenue South
Wisconsin Rapids, WI 54494
(715) 423-8555

Wisconsin Family Day Care Assoc.

Bev De Weese, Representative
N90 W17113 Highland Ct.
Menomonee Falls, WI 53051
(414) 255-5470

Wisconsin Child Care Admin. Assoc.

Jere Wallden, Representative
New Morning Nursery
3200 Monroe St.
Madison, WI 53711
(608) 233-0433

**Community Coordinated Child Care
of Dane County**

Diane Adams, Executive Director
3200 Monroe St.
Madison, WI 53711
(608) 238-7338

**Community Coordinated Child Care
of Milwaukee**

Lori Ohmes, Executive Director
2001 W. Vliet St.
Milwaukee WI 53205
(414) 933-9999

Children's Audit Project

UW Ext. Ctr. for Consumer Affairs

Patricia Mapp, Project Director
929 North 6th St.
Milwaukee, WI 53202
(414) 227-3250

or

Rm. 390
Home Economics Bldg.
UW-Madison
Madison, WI 53706
(608) 262-5498

STAFF

Executive Director

Mary C. Babula
WECA
1245 E. Washington
Madison, WI 53703
(608) 257-0909

WCCI Project Director

Wendy Hinrichs Sanders
P.O. Box 369
Hayward, WI 54843
(715) 634-3905

**School Age Child Care
Specialist**

Jill Ellen Steinberg
4017 Meyer Ave.
Madison, WI 53711
(608) 233-5255

**Indian Child Care Resource
Specialist**

Bill Welch
Rt. 1, Box 73A-1
Mason, WI 54856
(715) 278-3847

**Child Care Resource
Specialist**

Dana Sommerfeld
Rt. 9, Box 210D
Chippewa Falls, WI 54729
(715) 726-1178

WECA Administrative Asst.

Candace Meltesen - WECA
Office

WCCI Project Secretary

Dee Judd - Hayward Office

DHSS Contract Liaison

David B. Edie
Bureau for Children, Youth
& Families
Div. of Community Services
1 W. Wilson, Rm. 465
P.O. Box 7851
Madison, WI 53703
(608) 266-9200